IEMP-CC-GUIDE-OPS-002
REVISION A
EFFECTIVE DATE: 10/02/2007

IS01

Integrated Enterprise Management Program (IEMP)

Advanced Remedy Training

REVISION A

Distribution IEM internal only

CHECK THE MASTER LIST—
VERIFY THAT THIS IS THE CORRECT VERSION BEFORE USE

DOCUMENT HISTORY LOG

Status (Baseline / Revision / Canceled)	Document Version	Effective Date	Description of Change
Baseline	1.0	November 2005	Baseline Release
Revision	1.1	January 2006	Rewrite to include Remedy v5
Revision	1.2	May 2006	Updated to include changes in Application and added appendices with new form and field information
Revision	1.3	October 2006	Updated to include changes in Application, add change log, and version to each page footer
Revision	A	10/2/2007	Revised into CIO/IEMP doc standards, adjusted content

Table of Contents

SEARCHING THE DATABASE

Searching the database allows the user to search for records that meet a specific set of criteria. Search criteria can be entered in one of two ways:

- Search Window
- Search Bar

Define Search Criteria using the Search Window

The simplest way to specify search criteria is to enter data in field(s) from the search window that "match" the record or related records to display.

The search criteria determine which record or set of related records the system selects for the search operation. There are two ways to specify search criteria, creating a search-by-example or using the search bar (covered later in this document).

1. Open a search window by using one of the various options below.

- **Select File/*Open*** and **select** the form that you want to search against. **Click** the **Search** button.

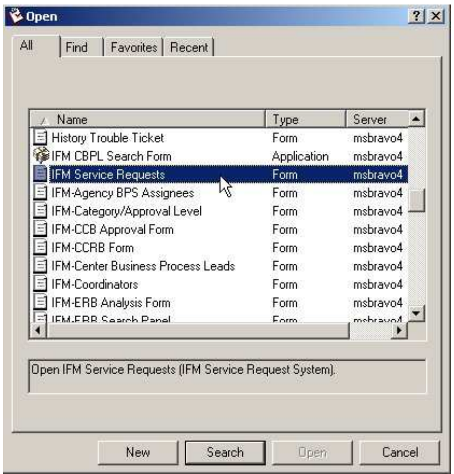


Figure 1 File/Open - Select Form

- **Select** the New Search button on the tool bar while in the ICRS system, or press the **F3** button.

Figure 2 New Search Button

- **Select File/*Recent Search Forms*.**

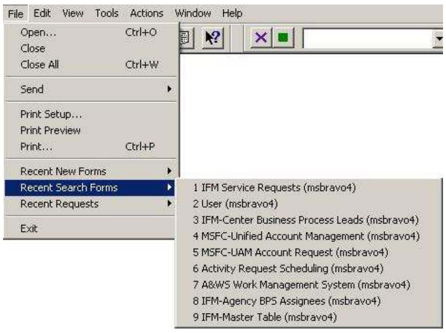


Figure 3 Recent Search Forms Menu

2. Define the search criteria to be applied to the search by filling in fields in the search window. You can also use the Advanced Search Bar, covered in the next section.

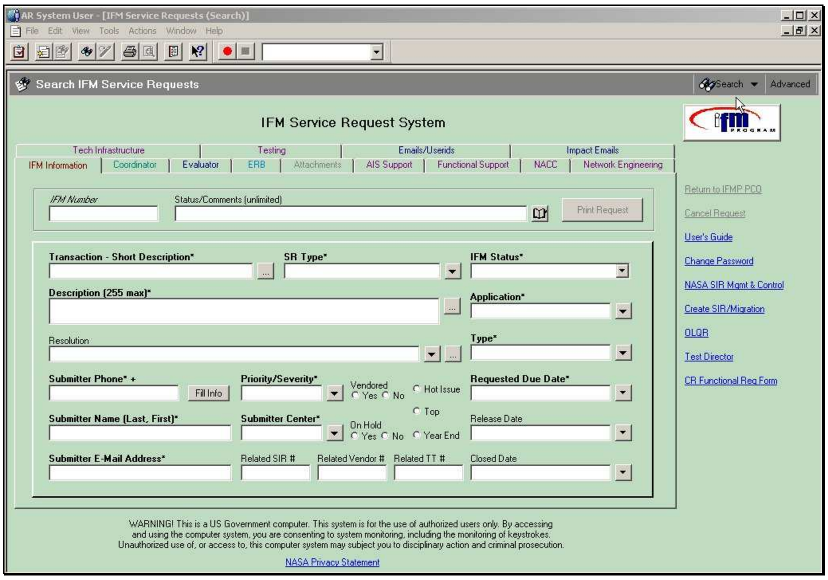


Figure 4 Sample Search using IFM Service Requests

NOTE: If you are using an already open search window, you may want to select **Edit/*Clear All*** (or hit **Control-E**) before performing your search. This will clear any existing values, including those that are hidden on other tabs, which may affect or interfere with your search.

Using Wild Card Symbols

Use wild card symbols to define search criteria in character fields within the form. Possible wild cards are listed below. These wild cards will generally return more records and are very useful if you do not know exact values for a particular field.

Wild Card	Description
%	Use to match any string of 0 or more characters. Example: J%SON matches JACKSON, JOHNSON, JASON, and JSON.
_	(Underscore). Use to match any single character. Example: B_B matches BAB, BOB, BUB.
-	(Hyphen). Use to indicate a range. Always use within brackets. Example: [A-F] matches A through F that is, ABCDEF.
[ ]	(Square brackets) Use to match any single character within a specified range or set. Example: [ABCF] matches the set of characters, A, B, C, or F.
[^]	Square brackets with caret) Use to match any single character not within a specified range or set. Example: [^A-F] matches all characters except the range A through F while [^ABCF] matches all characters except A, B, C, or F.

NOTE: The user can override the search style specified by the system administrator by using leading or trailing percent signs (%).

Figure 5 Sample Wildcard

Using Relational Operators

Relational operators can be used anywhere in the Search window. They are especially useful in non-text fields (e.g. date and time fields) when searching for a value within a numerical range. The following identifies the relational operators used in the Search Window.

Operator	Action
<	Matches contents that are less than the value.
>	Matches contents that are greater than the value
!=	Matches contents that are not equal to the value
<=	Matches contents that are less than or equal to the value
>=	Matches contents that are greater than or equal to the value
=	Matches contents that are exactly equal to the value

NOTE: Using relational operators allows the user to override the search style specified by the system administrator. For example, use the equals sign (=) to search for an exact match even if the defined search style is ANYWHERE.

Figure 6 Sample Relational Operators

Execute the Search

Running the Search

Once all search criteria has been entered in the search window, either by loading a saved search or entering your search criteria, the search is ready to be executed. To execute the search, simply **click** on the **Search** button to display the matches to your search.

NOTE: Select from *Recent Searches* from the Actions menu to select from previously performed searches or by clicking the down arrow next to the Search button.

When the search has been completed, you will see the matching results screen, shown below.

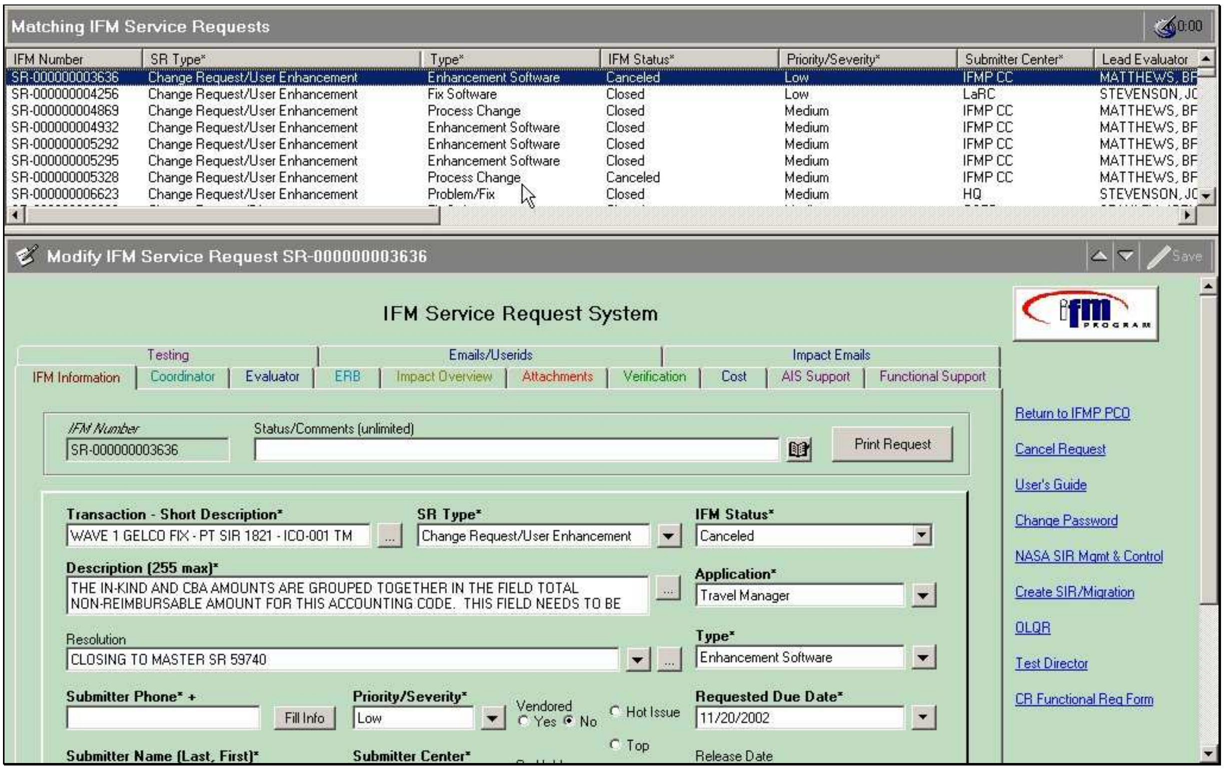


Figure 7 Sample Search Results

The Advanced Search Bar

The Advanced Search bar is another method for specifying search criteria. Shown in Figure 9 below, the advanced search bar defines a more complex set of criteria, such as records containing variables searching within a given date range. It also allows use of the certain field items or keywords in a search, which are not always available when using the simple search-by-example method.

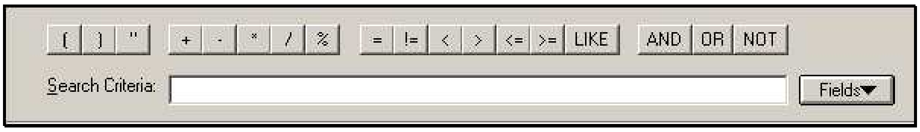


Figure 8 Advanced Search Bar

Search criteria can be entered using both the search-by-example and the advanced search bar at the same time. However, it is important to remember that any criteria entered in the search bar are used in addition (a logical AND) to the criteria defined using search-by-example.

Click the **Advanced** button at the top right of the screen in order o display the Advanced Search Bar.

Entering Information into the Advanced Search Bar

- Add a field name to the search bar using one of the following methods:
    - Position your cursor over the field name on the screen and left click the mouse. This will insert the field name, complete with single quotes, in the search bar.
    - Select the FIELDS button to display the Field List dialog box that lists all of the fields on the form. **Click** to select a field from the list. A Status History item or keyword can be selected from the Field List dialog box.
    - Type the field name **exactly as it appears on the screen (including special characters like * or /)**, enclosed in single quotes, in the search bar. Field names that use spaces or special characters must be enclosed in single quotes. It is recommended to use single quotes even when they are not specifically required for field specification.

- Type an operator or select the appropriate operator from the palette in the search bar. The operator is added to the search bar.

- Enter a field value. Non-numeric values must be enclosed in double quotes (" "). These values are case and space sensitive. As necessary, wild cards may be employed.

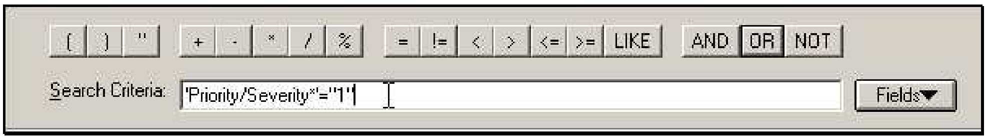


Figure 9 Sample Search (field name, operator, value)

- Continue adding operators, field names, and field values until the search statement is complete. Spaces are accepted between operators, but are not required.
- In the Advanced Search bar, wild card symbols are only interpreted as wild cards when used with the LIKE operator; otherwise they are interpreted as explicit characters. The search bar requires use of the percent sign (%) when including leading or trailing characters in the search.
- Click the **Search** button to execute the search.
- After the search is complete, select a record to view from the Matching results window.

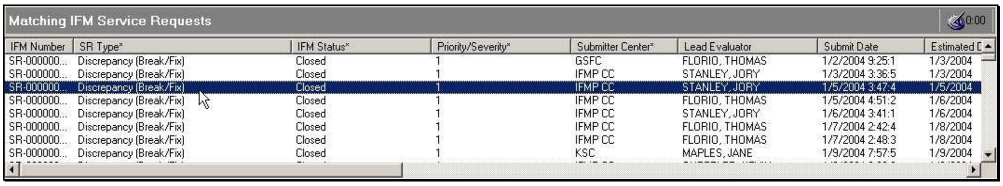


Figure 10 Matching Results

Using Operators in the Search Bar

The following operators can be used in the search bar in addition to the wild card characters previously described in the Using Wild Card Symbols section.

Operator	Action
AND &&	Logical AND is the result of two conditions in which both conditions must be true. For example, 'Status'="NEW" AND 'Assigned-to'="BOB" finds all new records assigned to Bob. The symbols && can be used in place of the word AND.
OR ||	Logical OR is the result of two conditions in which either condition is true. For example, 'Status'="NEW" OR 'Assigned-to'="BOB" find all new records and all records assigned to Bob (no matter what their status). The symbols || can be used in place of the word OR.

Operator	Action
NOT !	Negates the condition that follows. If the condition is false, the result is true. For example, NOT 'Status'="NEW" finds all records that are not new. The symbol ! can be used in place of the word NOT.
LIKE	Performs a pattern search. For example, 'Requester' LIKE "JO%DOE" finds all records with the requester name that begins with the letters JO and ends with the letters TON, such as John Doe and Jonathan Doe. The LIKE operator is useful only with character and diary type fields.
+	Adds two integer or real values. Adds an integer interval to a time value. For example, 'Create date' > $DATE$ + (28800) finds all records that were created after 8:00 am today. (28800 is the number of seconds in 8 hours.)
-	Subtracts two integers or time values (resulting in an integer). Subtracts an integer interval from a time value. For example, 'Create date' > $DATE$ - (604800) finds all records that were created within the past week. (604800 is the number of seconds in one week.) This is useful to include in a custom report that runs weekly and includes records created in the past week.
*	Multiplies two integer or real values. For example, 'Quantity' * 'Price' > 50 finds all records where the contents of the QUANTITY field multiplied by the contents of the PRICE field is greater than 50.
/	Divides two integer or real values. For example, 'Total Expenses' / 'Total Income' > 1 finds all records where the total amount spent for expenses equaled the total amount brought in as income.
<	Matches contents that are less than the value. For example, 'Create date' < ($DATE$ - 86400) finds all records created more than 24 hours ago (86400 is the number of seconds in 24 hours).
>	Matches contents that are greater than the value. For example, 'Create date' > "11/01/96 00:00:00" finds all records created since November 1, 1996.
!=	Matches contents that are not equal to the value. For example, ‘Status' != "Closed" finds all records that are not closed (includes all other status values except closed).
<=	Matches contents that are less than or equal to the value. For example, 'Salary' <= 10000 finds all records where the contents of the SALARY field is less than or equal to 10000.
=	Matches contents that are exactly equal to the value. For example, 'Status' = "Closed" finds all records where the contents of the STATUS field is Closed.

Figure 11 Sample Complex Search

Using Wild Card Symbols

In the search bar, wild card symbols are only interpreted as wild cards ***when used with the LIKE operator***; otherwise they are interpreted as explicit characters. The search bar requires use of the percent sign (%) when including leading or trailing characters in the search.

Search Bar Statement Conventions

Use the following conventions to construct a search statement in the search bar.

Fields	Enclose field names in single quotes. Single quotes are automatically added when selecting field names from the Field List dialog box or clicking on the field name in the search-by-example section of the window.
Values	Enclose non-numeric values, including time and selection values, in double quotes. For example, "11/01/96" Use the special value $NULL$ (without quotes) to search for records that have no value in a field. For example, to search for records that have not been assigned enter 'Assigned to' = $NULL$ Selection field values can either be specified as the text value in quotes or the numeric value or index not in quotes. For instance to specify the value New in a STATUS field with the following radio buttons: New, Open, Hold, and Closed can be entered using New or 0 since New is the first button selection.

Saving Frequently Used Searches

With your search criteria entered, you may want to save your search, especially if this is a search you will do on a regular basis. You must save the search **PRIOR** to executing it.

1. Enter your search criteria in the selected form on a Search window.
2. Before performing your search (by clicking on the search button), **select Actions/*Save Search*** from the menubar.

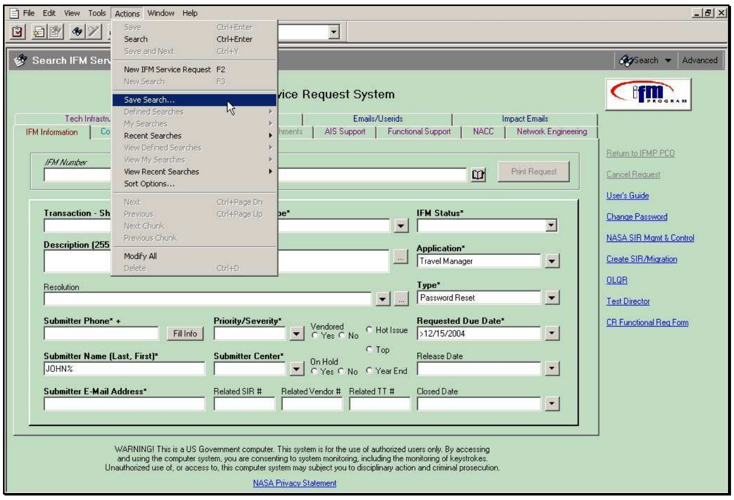


Figure 12 Saving a Search

3. You will then be prompted to enter the search name to be saved.
4. Type a name for the search.

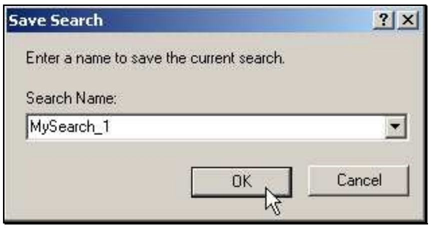


Figure 13 Naming the Search

5. Your search is saved.

Running a Saved Search

To execute a saved search in the future, you may **select Actions/*My Searches*** from the menubar or **click** on the down arrow next to the Search button.

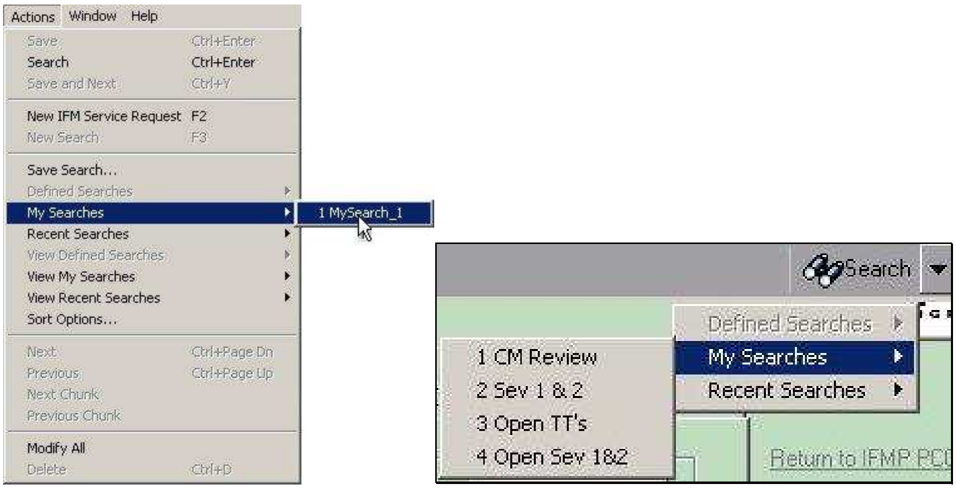


Figure 14 Retrieving a Saved Search (2 ways)

Search Operations

Sorting Search Operation Results

The user can specify a sort order that affects the result of a search operation display. The system allows up to five fields with each field ordered either in ascending or descending order. Additionally, a different sort order can be defined for each form.

Any field can be selected as a sort field with the exception of the status history, diary, or character field with a maximum length of over 255 bytes.

Specify Permanent in the Status field and the sort remains in effect until it is modified. Specify Next Operation in the Status field and the sort order takes effect only in the next operation.

Disable a specified sort order by selecting Disable in the Status field. By default, all records are sorted by entry ID in ascending order, thereby listing all records in ascending order by Submit Date.
To specify the sort order in a search operation:

1. Select Sort Options from the Actions menu to display the Field Sort Order dialog box.

Figure 15 Select Sort Options…

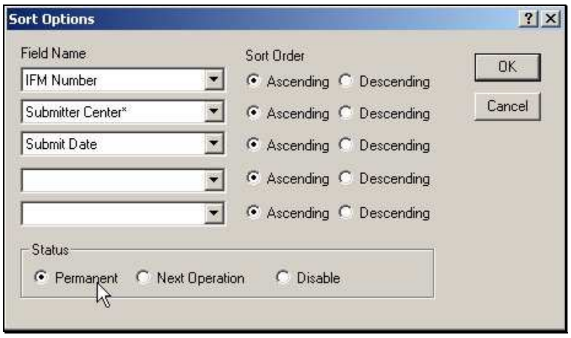


Figure 16 ... and select the preferred sort order

2. Select the down arrow to the right of the Field Name field to display a drop down box with all the fields on the current forms available for sort.
3. Select the field to sort by. Select up to five fields to sort by. To delete a specified sort field, delete the selection from the Field Name field.
4. Select either the Ascending or Descending Sort Order button next to the Field Name selected.
5. Select one of the following options from the Status field:
   - **Permanently** applies the selected sort order to **all** operations.
   - **Next Operation** applies the selected sort order to the **next search operation only** then returns to the previous sort order.
   - Disable returns to the default sort order. If no sort options are specified or is Disable is selected, the items in the search operation are sorted in ascending order by entry ID.
6. Select OK to execute the sort request.

Additionally, users may sort search results on screen by clicking the column title of the Results display. This will sort the results by the column in question in ascending order:

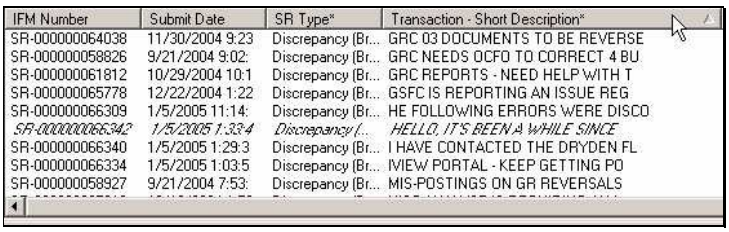
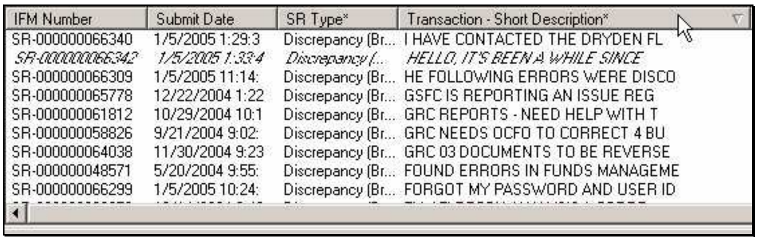


Figure 17 Clicking a Header to Perform a Sort (Ascending)

Clicking the column again will re-sort the results in descending order:



IFM Number	Submit Date	SR Type*	Transaction - Short Description*
SR-000000066340	1/5/2005 1:29:3	Discrepancy (Br...	I HAVE CONTACTED THE DRYDEN FL
SR-000000066342	*1/5/2005 1:33:4*	*Discrepancy (...*	*HELLO, IT'S BEEN A WHILE SINCE*
SR-000000066309	1/5/2005 11:14:	Discrepancy (Br...	HE FOLLOWING ERRORS WERE DISCO
SR-000000065778	12/22/2004 1:22	Discrepancy (Br...	GSFC IS REPORTING AN ISSUE REG
SR-000000061812	10/29/2004 10:1	Discrepancy (Br...	GRC REPORTS - NEED HELP WITH T
SR-000000058826	9/21/2004 9:02:	Discrepancy (Br...	GRC NEEDS OCFO TO CORRECT 4 BU
SR-000000064038	11/30/2004 9:23	Discrepancy (Br...	GRC 03 DOCUMENTS TO BE REVERSE
SR-000000048571	5/20/2004 9:55:	Discrepancy (Br...	FOUND ERRORS IN FUNDS MANAGEME
SR-000000066299	1/5/2005 10:24:	Discrepancy (Br...	FORGOT MY PASSWORD AND USER ID

Figure 18 Clicking a Header to Perform a Sort (Descending)

MACROS

You can create macros to automate operations that you perform frequently. You can use menu commands to record and run macros, or you can show the macro bar and use its buttons.

Here are some examples of macros:

- A macro that opens a form in Search mode and fills its fields with search criteria. You can run the macro, add further criteria specific to the search you want to perform, and then run the search. This macro is useful if you perform many searches with similar criteria.
- A macro that opens a form in New mode and fills its fields with common information. This macro is useful if you create many requests with similar information. You can then add additional information specific to your current request, and save it.
- A macro that executes other macros. While recording the new macro, execute an existing macro. You can create powerful macros that can perform a series of complex tasks.
- A macro that generates a report. This is useful if you need to run the same report frequently.
- A macro that records searches. This can include saved searches, recent searches, or predefined searches.

Tip: Before you record a macro, test the operation you intend to record to ensure that it produces the results you expect.

While the macros can be recorded, there are times when many searches need to be run, but only one value changes over time. A separate macro file is not required for this. Macros are flexible enough to allow you to have the system prompt for a particular value.

Recording a Macro

Recording a Macro can be accomplished either via the menu or by turning on the Macro Toolbar. To turn on the toolbar, select View, then Macro Bar.

Figure 19 Enabling the Toolbar

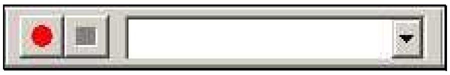


Figure 20 Ready to Record Macro

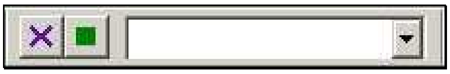


Figure 21 Ready to Save Macro

1. **Select *Tools*/*Record Macro*** or click the button with the red circle (shown in Figure 20).

2. Perform the operations you want to record as a macro.

   NOTE: For information about recording a macro with variables see below *Recording a Macro with Variables*

   To ensure that default values are not recorded as part of the macro, you may want to **select Edit/*Clear All*** (or hit **Control-E**) as part of the recording.

   During the recording, some operations are not actually performed; for example, creating a new request or modifying an existing request. A message informs you that no database operation has occurred. Other operations that are not performed include setting options, changing window position or size, or any operation that fires an active link.

3. To save the macro, **select Tools/*Save Macro*** or click the button with the green square (shown in Figure 17). To cancel the macro recording process, **select Tools/*Cancel Recording*** from the menu or you can click the button with the X in the Macro Bar, shown in Figure 21.

Figure 22 Save your Macro, or …

Figure 23 … Cancel your Macro

4. In the *Macro Name* field, enter a name for your macro. You can enter up to 30 characters.

5. In the *Path* field, specify the path where you want to save the macro. The paths that appear are those listed in the Search Path in the General tab of the Options dialog box. **Select Tools/*Option*** to view the **General** tab.

6. In the *Help Text* field, enter a description of the macro and its functions. This description will appear in the Run Macro dialog box. It helps to identify the macro's function.

7. If you want to continue recording further steps in the macro and cancel the Save operation, **click Continue Recording**. When you are ready to save the macro, repeat steps 3 to 8.

8. **Click Save** to end the recording session and save the macro. If you want to exit the recording session without saving the macro, **click Cancel**.

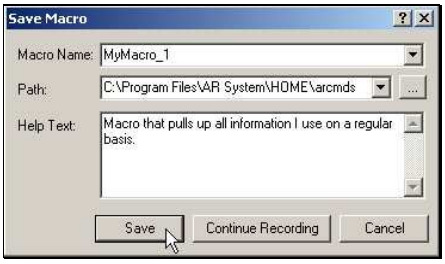


Figure 24 Save and Describe your Macro

The macro file name is appended with the suffix: .arq.

Recording a Macro with Variables

You can record a macro that enables you to change certain values when you run the macro. That is, when the macro is running, you can enter variable values in the appropriate fields.

For example, you could create a macro that finds and displays assigned requests that have a severity 1 priority, but you want to specify a different date range each time you run the macro.
To create this macro with variables, you record the search operations as usual; but for the information that varies, you enter prompt text enclosed by dollar signs ($). In this example, to be able to specify the Submitter Center each time you run the macro, enter the prompt text $Submitter Center$ instead of a specific name in the Submitter field.

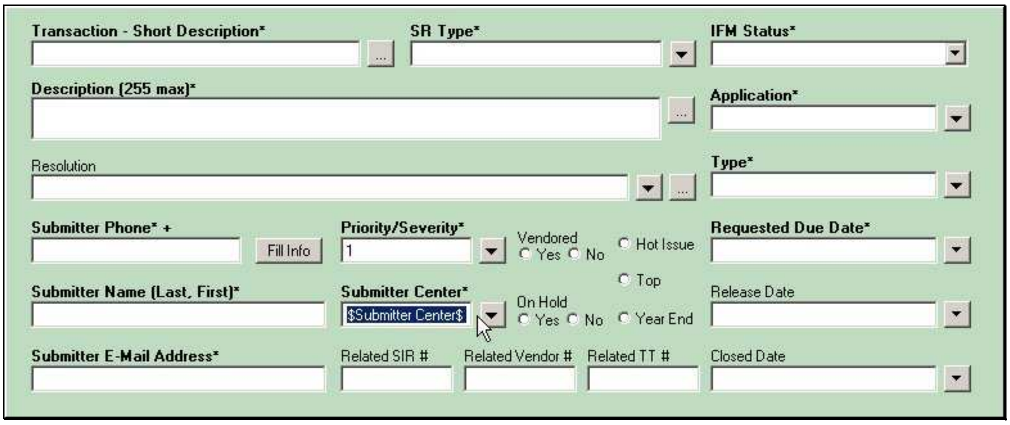


Figure 25 Submitter Center is now variable!

As you continue recording the search, you are prompted to enter a sample value for this variable. The values you enter are used in the recording session but are not retained as part of the macro.

NOTE: *You cannot include dollar signs ($) as part of the variable name.*

When you run this variable-filled macro, you will be prompted to enter values for each variable-value field, as shown below.

Figure 26 Prompting for Values

Running a Macro

To run a saved macro, follow the steps outlined below. If any variable values are required, you will be prompted for the values when the macro is run, as shown in Figure 19 above.

1. Make sure the **Macro Bar** is visible as per Figure 18 above.

2. Click the dropdown box. A list of all macros you have that are saved in folders specified in the *Search Path* field (located on the **General** tab of the Options dialog box) will be listed.

Figure 27 Macro Dropdown box

3. **Select** the macro. The macro runs and performs the previously recorded steps.

Sharing a Macro

You can share macros in two ways:

1. Copy the macro from another user.

   Macro files are saved as <macroname>.arq in the folder specified in the *Search Path* of the **General** tab in the Options dialog box.

   You can copy a macro into one of these folders. Once the macro file is copied, it is available the next time Remedy User is started.

2. Specify the folder that contains the macro file you want to access in the Search Path of the General tab in the Options dialog box. For example, the shared folder could be on a shared network machine.

You can usually share macros with colleagues using Remedy User tools running on different platforms. However, macros that generate printed reports may not work between different platforms.

REPORTS

The reporting tool in Remedy User enables users to generate reports about service requests (SR's) meeting a specific set of search criteria. For example, a report that lists all the calls from a particular center may be needed by management. This report would then need to be sorted according to whether the SR's are resolved.

To do this, you would first search for all the support calls from the desired center. Then you would run the report. You can create a new report, or you can choose a previously created custom report (if you have one) and modify it as necessary. You can save the report as a custom report; you can also run the report and send it to one of several different output mediums:

- Screen
- Printer
- File
- Another application.

Creating the new report entails the following required steps:

1. Determining which SR's to include in the report
2. Creating a new report or modifying an existing report
3. Adding the appropriate fields to the report

The steps below are optional:

4. Specifying fields to sort and group by
5. Defining statistics for the fields in your report
6. Defining page setup specifications
7. Saving the report

Selecting Reporting from the Tools menu allows the user to design a report and send the output to the screen, a file, a printer, or another application. See Figure 26.

Creating a New Report

Before you create, view, or generate a report, you should determine which fields you want to include in it as well as which form you want to use to generate the report. The form for the report must be open and in Search mode.

1. Open the form you want to report on, in Search mode. This will usually be the IFM Service Request form.
2. Determine which SR's you want to include in the report by entering your search criteria. Perform a search to retrieve them. You can save this search also (please refer to the section on executing and saving searches elsewhere in this document). A few notes about SR's and results:

   - If no results list is open, the report automatically includes all SR's that match the criteria defined within the fields of the form. If no search criteria are defined, all SR's are included.
   - If a results list is open with no SR's selected, the report includes all the SR's in the results list. By default, one request is selected. To deselect it, **press** [Ctrl] and **click** on the request.
   - If a results list is open, and you select SR's in it, the report includes only the selected requests.

3. From the menu bar, **select Tools/*Reporting*,** or select the Report button ( ). The Report window appears for the form. It lists all existing reports in the folder you have specified in the Search Path of the General tab in the Options dialog box. If you have no reports defined, you will see the Report List Window shown below:

Figure 28 Tools/Reporting Menu

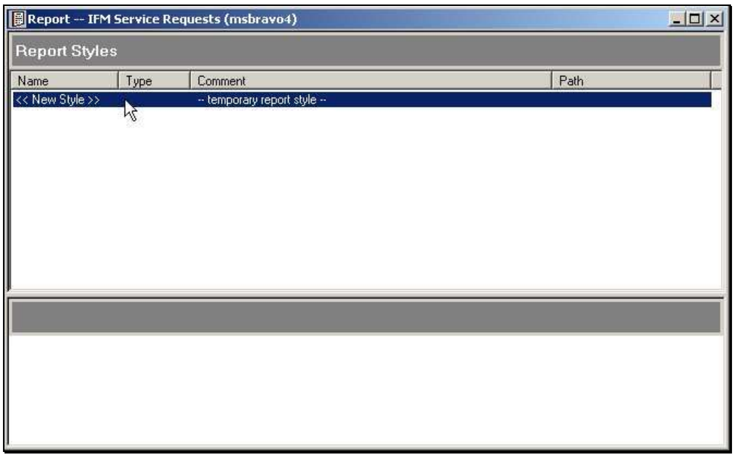


Figure 29 Report List Window

4. From the menu bar, **select Report**/***New***, or double click the line titled **"<<NEW STYLE>>"**. The Properties dialog box appears. Here you can define the report parameters and its appearance.

Figure 30 Report/New Menu

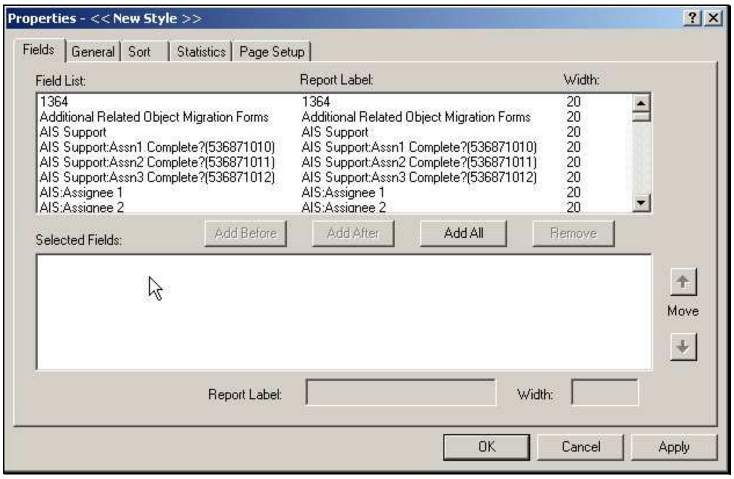


Figure 31 New Report Style Window

Adding Fields to the Report

Fields can be added to any report, whether it is a brand new report or you are modifying a pre-existing report. The process is the same.

1. Create a new report **OR** open an existing report.
2. In the Properties dialog box (**select Report/*Properties Enter*** from the menu bar), **click** the **Fields** tab (circled in the figure below).

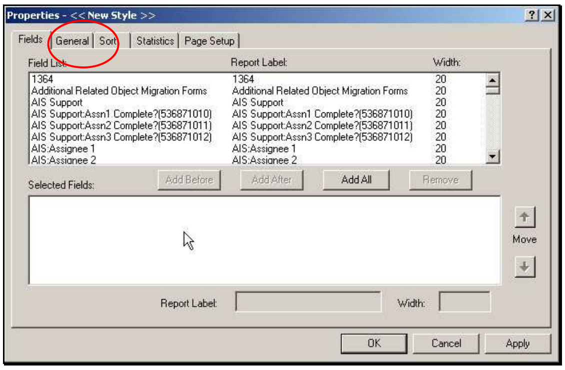


Figure 32 Report Properties Window

3. **Select** the fields you want to include in the report from the Field List in the upper half of the dialog box. There are multiple ways to do this.

- ✓ To select a single field, **click** on the field name. You can also simply double-click. This accomplishes the same thing as selecting the field and clicking the **Add After** button.
- ✓ To select adjacent fields, **hold down** the mouse button, and **drag** the mouse from one field to the next until all the fields you want to add are highlighted.
- ✓ To select nonadjacent fields, **click** on the first field, and **hold down** the [Ctrl] key as you **click** on one or more additional fields.
- ✓ To deselect a field from a selection, **hold down** the [Ctrl] key and **click** the field.

4. If you want to put the new fields in a particular position in the Selected Fields list in the bottom half of the dialog box, click on a field in the Field List to highlight it. **Click** on a field in the Selected Fields list to highlight it. **Click** the **Add Before** or **Add After** button to add the new fields before or after the highlighted field in the Selected Fields list.

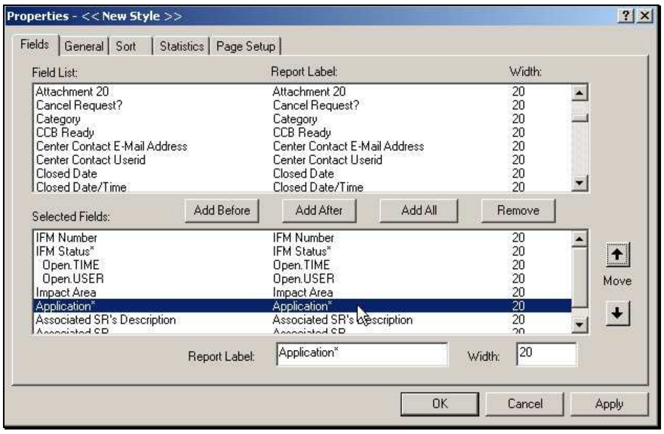


Figure 33 Adding Fields to a Report Definition

- The order in which the fields are listed is how they will appear in the report.
- The fields you select for the report appear in the Selected Fields list. If no field is highlighted in the Selected Fields list, the **Add Before** button places the new fields at the top of the list, and the **Add After** button places the fields at the bottom of the list.
- To remove a field from the Selected Fields list, **select** the field, and **click Remove**.
- If you add a field by double clicking, be sure to note which field is highlighted in the lower pane of the window. It will add it directly below the highlighted field.
- To move a field in the report list, highlight the field and click the arrow keys up or down.

5. If you want to update the report in the Style Preview pane without closing the dialog box, **click Apply**. The fields appear in the Style Preview pane as they will appear in the final report.
6. When you have finished defining report properties, **click OK** to close the dialog box.

Report Output Options

The user can print the report to the screen, a file, a printer, or another application, such as Excel. To output the report, simply

Selecting **Report/*Preview*** from the menu bar or clicking on the **Preview** button on the toolbar displays the results on the user's screen.

The preview version shows the fields in a vertical fashion, as a form. See the illustration below.

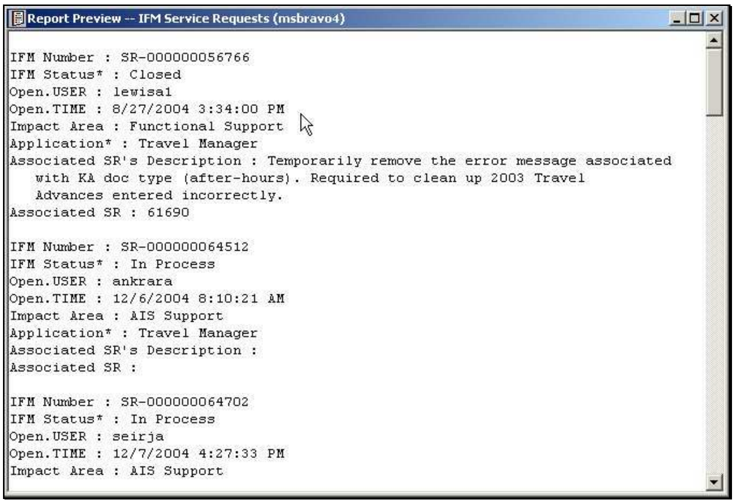


Figure 34 Sample Report Output

If you export to a file, such as a CSV (Comma-separated values) file for Excel, it arranges it in a columnar format. Below shows the same report, but in Excel (CSV) format:

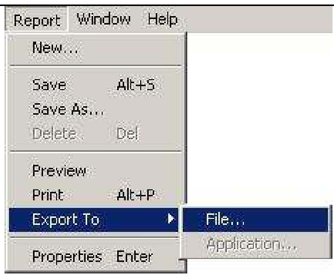
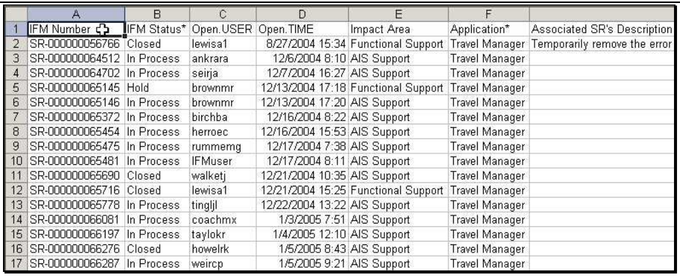


Figure 35 Exporting to File



	A	B	C	D	E	F	
1	IFM Number	IFM Status*	Open.USER	Open.TIME	Impact Area	Application*	Associated SR's Description
2	SR-000000056766	Closed	lewisa1	8/27/2004 15:34	Functional Support	Travel Manager	Temporarily remove the error
3	SR-000000064512	In Process	ankrara	12/6/2004 8:10	AIS Support	Travel Manager	
4	SR-000000064702	In Process	seirja	12/7/2004 16:27	AIS Support	Travel Manager	
5	SR-000000065145	Hold	brownmr	12/13/2004 17:18	Functional Support	Travel Manager	
6	SR-000000065146	In Process	brownmr	12/13/2004 17:20	AIS Support	Travel Manager	
7	SR-000000065372	In Process	birchba	12/16/2004 8:22	AIS Support	Travel Manager	
8	SR-000000065454	In Process	herroec	12/16/2004 15:53	AIS Support	Travel Manager	
9	SR-000000065475	In Process	rummemg	12/17/2004 7:38	AIS Support	Travel Manager	
10	SR-000000065481	In Process	IFMuser	12/17/2004 8:11	AIS Support	Travel Manager	
11	SR-000000065690	Closed	walketj	12/21/2004 10:35	AIS Support	Travel Manager	
12	SR-000000065716	Closed	lewisa1	12/21/2004 15:25	Functional Support	Travel Manager	
13	SR-000000065778	In Process	tingljl	12/22/2004 13:22	AIS Support	Travel Manager	
14	SR-000000066081	In Process	coachmx	1/3/2005 7:51	AIS Support	Travel Manager	
15	SR-000000066197	In Process	taylokr	1/4/2005 12:10	AIS Support	Travel Manager	
16	SR-000000066276	Closed	howelrk	1/5/2005 8:43	AIS Support	Travel Manager	
17	SR-000000066287	In Process	weircp	1/5/2005 9:21	AIS Support	Travel Manager	

Figure 36 Sample Output

Selecting **Report/*Export to/File*** displays the Report File dialog box. The user selects the filename and directory which to save the file. Make sure you have closed the preview window or the Report window has the focus in Remedy. If you are printing to a file type such as CSV, be sure to change the Save As type to the proper format.

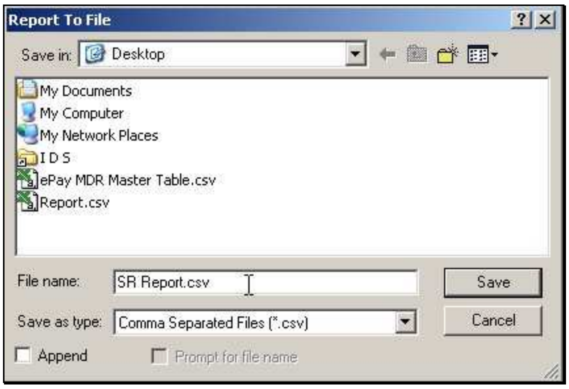


Figure 37 Report To File Window

Selecting **Report/*Print*** or clicking on the Print button displays the Printer Setup dialog box that allows the user to modify the printer setup or print to the default printer.

Report Output in Macros

When a report output is part of the results of a Macro, Remedy will default to saving the report with the exact same file name every time it is run. However, the user has the following options:

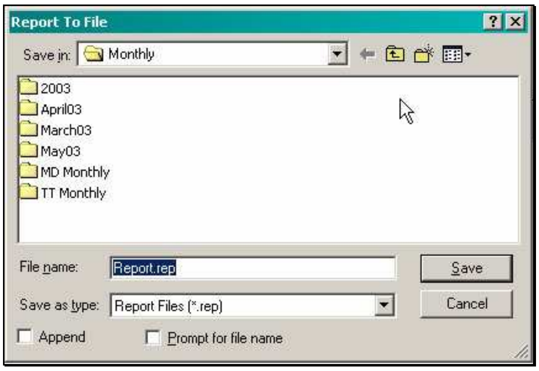


Figure 38 Report Output While Recording Macros

- **Append**. Instead of overwriting the file each time, the macro will append the new output to the old in the same output format.

- **Prompt for file name**. This allows the user specify a new output file name every time the macro is run. This will only appear when doing this while doing a Macro.

APPENDIX A – REPORTING FORMS

Any form can be used for reporting, but needs will dictate which form is used. For most reporting, the IFM Service Request form will be form of choice. However, recent changes to the Service Request form have led to some required changes in how reporting is done.

In particular, doing reports on SR Assignees requires the use of a new form, When opening a new form, look for IFM-Assignee Reporting Form. This is a join form that links the Assignee table with the Service Request table. Please see Figure 39 for the form listing.

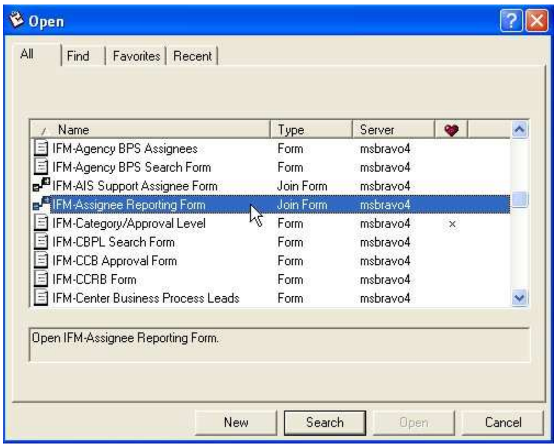


Figure 39 – Form Listing (IFM-Assignee Reporting Form)

Upon opening the form, you will see the following screen:

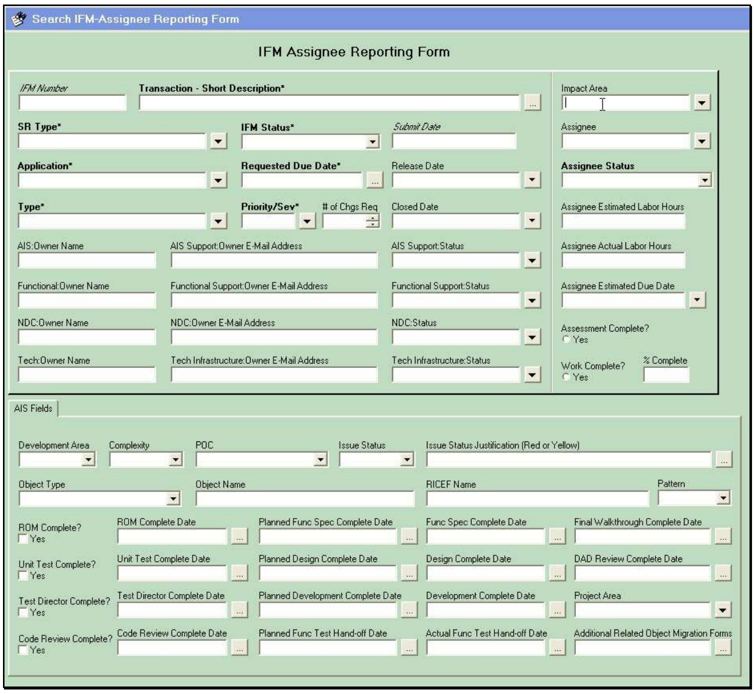


Figure 40 – IFM-Assignee Reporting Form (Search)

By filling in the desired fields, the desired assignee information can be retrieved. The Reporting tool and macro techniques can be applied at this point to generate reports based on this form

APPENDIX B – ADDITIONAL FIELD LOCATIONS

Fields used for reporting are generally found in forms. There are additional fields you can use for reporting that would normally be found in the Diary – a harder field to work with for reporting needs.

The Diary records Status History. By pressing Ctrl-H when looking at an SR, viewing the history of an SR can be done in a single window. This will show when a particular step in a service request was completed, who completed it, and indicate date/time of when it was stamped. See Figure 41.

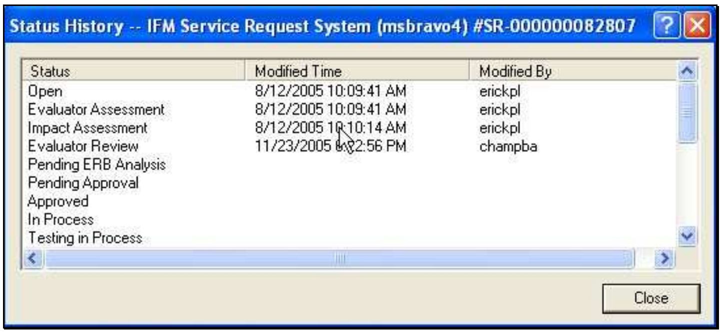


Figure 41 – Status History

Each of the Modified Time and Modified By fields is a separate field. For an example you can easily search on all Closed SR’s performed on a given day or by a given user. These fields are listed in the IFM Service Request Form under the field labels shown below in Figure 42.

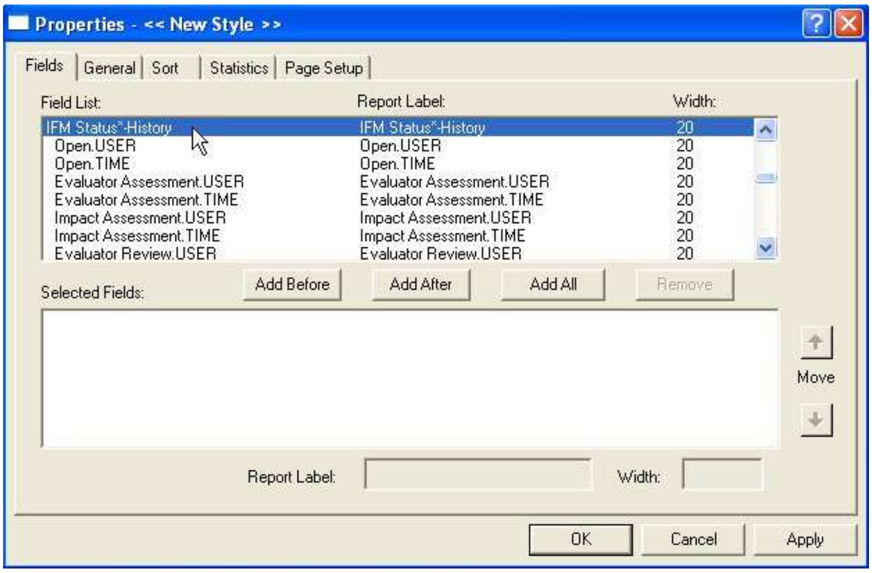


Figure 42 – IFM Status History fields

All fields below IFM Status*-History (indented) are available. Simply select which fields are required for the reporting and add them to the report. These fields can also be reached in the Search mode by using the Advanced Search discussed previously.

To get to them, activate the Advanced Search, click the Fields dropdown button. IFM Status*-History will be listed in the first column. Select the Time or User option and then select the status for which you are searching.

See Figure 43.

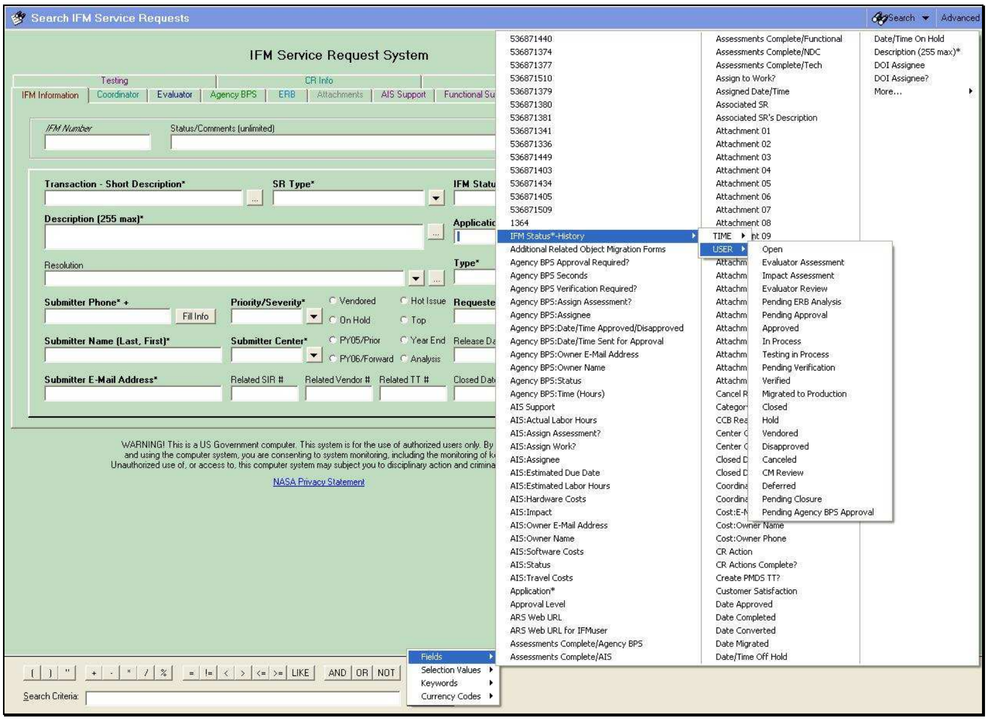


Figure 43 – IFM Status*-History in Search Mode

Upon selecting a field, complete the Search Criteria, as illustrated in Figure 44 below. The example shown will show all SR's with a Status of CLOSED that were closed by the user with the "userid" listed.

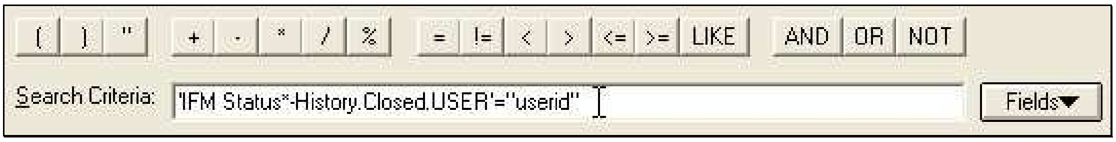


Figure 44 – IFM Status*-History field used as search